

## PLANNING YOUR MEETING:

When contacting a facilitator, you should have the answers to the following questions. This helps to:

- ◆ Determine whether a meeting is actually needed
- ◆ Determine whether a facilitator is needed, and if so, what type of facilitator
- ◆ Identify the range of services the client needs, and provide consultation on process design
- ◆ Match a facilitator's skills to the needs of the client

1. **WHO IS THE CLIENT:** This is the person who will decide what the process or meeting will look like before and during the meeting, and who is responsible for follow-up after the meeting. Try to get ONE person identified as the client if at all possible.

2. **DESIRED OUTCOMES:** What would the client like to get out of the meeting or process? What products? Relationship changes? Services? Information? Decisions? (Helpful tools are Issue Statement guidance, or for or complex projects, the scoping kit. These can be obtained from Debbie Robinson or Julie Bowen.)

3. **BACKGROUND:** What is the larger context that this meeting or process fits into? What is the background for this meeting or process? Facilitation is often part of a process, in which case it should not be considered or planned for as an isolated event. Who has a stake in the outcome of the meeting or process? What would they consider a "win"?

3. **DECISION PROCESS:** What decisions will be made at the meeting or during the process? What is the decision method? If consensus, what is the fall back? If decisions will be made after the meeting or process, by whom? How? When? (The Empowerment Scale is a useful tool.)

4. **TIME FRAME:** If known, what are the date, time, place and number of meetings? If not known, what is the time frame the client is striving for? Does the time frame seem workable given the answers to questions 1 and 2?

5. **THE PEOPLE:** If known, how many people are part of the process? Who are they or who do they represent? Are they the right people at the right hierarchical level? What does the client know about the personalities of participants? To what degree are the participants part of the planning process for the meeting or event?

6. **TYPE OF MEETING OR PROCESS?** Examples include: Technical Workshop, Watershed Advisory Committee Process, Superfund Public Meeting, PPA Negotiations, PPA Process Planning, Team Building Retreat, Strategic Planning, Feedback Meeting, Roles and Responsibilities, Workload Balancing, etc., etc.

7. **WHY is the client asking for A FACILITATOR?** What specifically does the client want the facilitator to do? What special skills or qualities is the client looking for?

8. **WHAT CHALLENGES** might the facilitator face? If known, what difficult behaviors or group dynamics might pose a challenge? What content-related challenges might come up (e.g., highly controversial topic, lack of trust in EPA's role . . .)

9. **WHAT LOGISTICS ARE NEEDED AND WHO WILL HANDLE THEM?** What is the set-up, what is needed: Room, breakout rooms, tables chairs, audio-visual equipment, flip chart easels and pads, markers and tapes, other supplies, refreshments, etc.